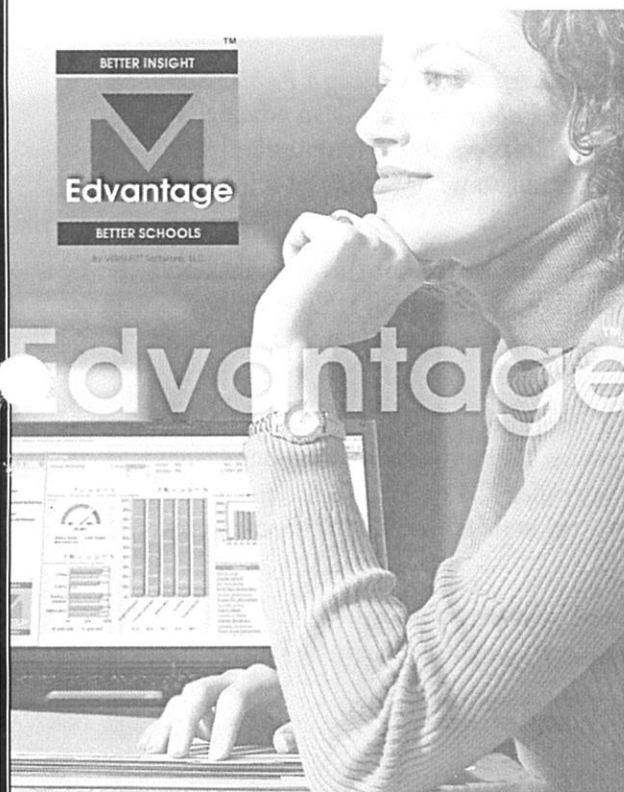# State of Tennessee Department of Education

State of Tennessee Department of Education Response to RFP 33150-02211 for P-12 LDS Early Warning Data System

Original
May 31, 2011

Edvantage Best of Buy and Build Delivers Results Faster with Cost Savings for Tennessee DOE

Proven and Comprehensive LEA LDS and At Risk Solution

VersiFit Software, LLC, Appleton, WI   Better Insight – Better Schools

May 31, 2011

Kristen McKeever, RFP Coordinator
710 James Robertson Parkway
Andrew Johnson Tower, 6th Floor
Nashville, TN 37243

Dear Ms. McKeever:

VersiFit Software, LLC is pleased to present this proposal in response to the State of Tennessee Department of Education Request for Proposal #33150-02211 for a P-12 Early Warning Data System. Our proposal reflects the unique advantages (*much lower cost and shorter time to production*) that only a highly successful commercial-off-the-shelf (COTS) LEA LDS with pre-built Century SSMS data extractors and a proven At Risk Early Warning System can provide. In fact, Tennessee will get the best of both buy and build approaches since the Edvantage software will be customized to meet Tennessee's exact requirements.

VersiFit's **At Risk-Early Warning Solution, in** *full production at districts like Chicago Public Schools, Milwaukee Public Schools, and soon to be in production at Buffalo Public Schools* is an advanced analytic solution that combines all of the best features of a dashboard, reports, and a longitudinal data system to promote early detection of students that are not likely to graduate without district interventions.

Our **Edvantage** Longitudinal Data System is currently at work in over 300 school districts nation-wide, including some of the largest districts in the nation. **Edvantage** leverages Microsoft Business Intelligence software to deliver an end-to-end LDS for education: A comprehensive Longitudinal Data Warehouse with Extract, Transform, and Load (ETL) software that includes data cleansing; a user-friendly Dashboard; and an effective Reporting system for data-driven decision making.

VersiFit is proud to offer the Oregon and Hawaii Departments of Education, Chicago Public Schools, Milwaukee Public Schools, and Portland Public Schools as references. With over 400,000 hours' experience working with these organizations, as well as with many other K-12 education clients to build state, regional, and district educational data management systems, we believe that VersiFit can supply Tennessee with:

- An At Risk-Early Warning Solution that will exceed your expectations;
- A proven Longitudinal Data System (data warehouse, staging area, Century ETL extractors);
- Comprehensive Dashboard Reporting and Analysis; and
- Excellent Training and Support.

We want to thank the State of Tennessee for this exciting opportunity to respond and we look forward to contributing to the educational success of your administrators, teachers, staff, parents, and students.

VersiFit acknowledges acceptance of the requirements of the State of Tennessee DOE RFP 33150-02211 and receipt of any and all Addenda(s) to the RFP. This proposal is valid for one-hundred and twenty (120) days from the date of submission.

Sincerely,

Michael Restle, President
VersiFit Software, LLC
920-830-0102

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Confidentiality Statement

Technical data contained in this Proposal furnished in connection with the State of Tennessee DOE Request for Proposal #33150-02211 for a P-12 LDS Early Warning Data System shall not be used nor disclosed except for evaluation purposes, provided that, if a contract is awarded to VersiFit as a result of or in connection with the submission of this Proposal, the State of Tennessee shall have the right to use or disclose technical data to substantiate the award of a contract.

The terms of this Proposal are valid for one-hundred and twenty (120) days after receipt of this proposal by the State of Tennessee.

Executive Summary

Introduction

VersiFit Software, LLC is proud to offer this Proposal in response to the State of Tennessee DOE Request for Proposal #33150-02211 for a P-12 LDS Early Warning Data System. Our value proposition for the Tennessee Department of Education is *less cost, faster implementation, no risk, and proven COTS software that will be customized to meet the requirements of the Tennessee Department of Education and the Tennessee LEAs.*

Background

The State of Tennessee DOE desires a P-12 LDS Early warning Data System comprising the following components:

- At Risk-Early Warning Solution
- LEA Longitudinal Data System (data warehouse, staging area, ETL processes)
- Dashboard Reporting and Analysis

At Risk Early Warning Solution with State-wide LEA LDS

In response to this Request, VersiFit Software, LLC, is proud to *propose our state-wide LEA LDS and our Edvantage At Risk-Early Warning Solution that is fully FERPA compliant.* VersiFit is the Value-Leader in providing high-performance decision-support Data Repositories for the educational community with over 11 years of education experience developing and implementing Data Repositories. Our product, **Edvantage**, provides *more features, better technology, higher performance, and more flexibility for less cost, than any alternative* education LDS and At Risk available solutions.

VersiFit will exceed the State of Tennessee needs with the following:

Longitudinal Data

The State of Tennessee will have *longitudinal data well beyond the stated requirements, in fact over 3,000 attributes, almost 50 domains (data marts), and complete metadata* for Students, Courses, Enrollments, Daily and Period Attendance, Student Schedules, Final- Progress- and Curriculum Marks, Benchmark- Formative- and Summative Assessments, Discipline, Programs and Interventions, Staff (Qualifications, Schedules, and Attendance), Finance, and Data Quality.

Longitudinal Data Warehouse

- The Tennessee state-wide LDS and Early Warning System will be similar to the Hawaii SEA and LEA state-wide LDS implementation, USDOE: *"one of the top implementations in the country."*

- A fully-configured, Web-based, *Microsoft longitudinal data warehouse solution*

- *Metadata driven ETL processes* seamlessly integrated with the Data Repository

- *Assured data quality* through the creation, implementation, and documentation of a thorough testing approach, as well as comprehensive error logging and reporting

- *Microsoft* and *Open-architecture* to support platform independence
- *Over 400,000 hours of experience* working with K-12 education clients to build, implement, and develop state, regional, and district Educational Data Management Systems with complete source-system integration

- *Recommended by the CCSSO* as an excellent longitudinal data system in 2009 following an Independent Third Party review funded by the U.S. Department of Education for the State of Hawaii. In fact, it is partly because of VersiFit's SLDS in Hawaii, which was commended by the U.S. Government, that the state will be awarded $75 million as one of the winners in the *Race To The Top* Program.

Reporting and Analysis

- Integrated and embedded tier-1 *end-to-end Microsoft Business Intelligence reporting software: SharePoint/PerformancePoint, Analysis Services, Reporting Services, and Office Excel and Word Integration*.
- *Ad-hoc* library of *pre-built educational software integration templates*
- Edvantage includes over *160 reports and 100 metrics* on many dashboard pages.

Administration, User, and Security Management

- Complete *Administration, User, and Security management*, including online reporting of data warehouse and end user activities; the capacity to monitor refreshment of data within the data warehouse; and tools for Performance Management

Training and Support

- Edvantage COTS includes *comprehensive knowledge-transfer program*, including complete system documentation, onsite-customized user training, and our comprehensive software support and maintenance program
- The LEA LDS and Early Warning solution *includes professional development, school level change management* and comprehensive training workshops

VersiFit Team Experience

- VersiFit Team history of *100% successful implementations*
- Every VersiFit resource having *at least 6 years of education LDS development and implementation experience*, and most resources having 12 years of such experience

Architecture

VersiFit will use its *end-to-end Microsoft Business Intelligence technology architecture*, as defined below.

Solution Components	Microsoft Architecture (Option 1)
Data Warehouse	**MS SQL Server 2008**
Reporting and Analysis Layer	**MS Reporting Services and MS Analysis Services**
Extract, Transfer, and Load, and Data Quality Capabilities	**MS SSIS & Transformation Services**
Portal and Dashboard	**MS SharePoint & MS PerformancePoint**

Approach

VersiFit will use the *Tennessee Department of Education project approach* and with your permission we will integrate that approach with the *Project Management Institute (PMI) Project Management methodology* to manage and execute the project.

Timeline

VersiFit is ready to *start the project on July 1, 2011*. We will work with the Tennessee Department of Education to initiate the project at that time and we *will prepare a jointly designed comprehensive project plan with frequent incremental deliverables* as well as comprehensive planning documents as defined in the *Project Management Institute Body of Knowledge guide for the Planning Process group*.

Proposal Outline

The remainder of this Proposal follows the format outlined in the RFP.

QUALIFICATIONS EVIDENCE GUIDE

The Proposer must address all items detailed below and provide, in sequence, the information and documentation as required (referenced with the associated item references). The Proposer must also detail the proposal page number for each item in the appropriate space below, and use this guide to cover the Qualifications Evidence section of the proposal (as its table of contents).

Prior to State evaluation of Qualifications Evidence, the RFP Coordinator will review each proposal for compliance with all RFP requirements, including but not limited to:

- The proposal must be delivered to the State no later than the Proposal Deadline.
- The Qualifications Evidence and the Cost Proposal must be packaged separately as required.
- The Qualifications Evidence must NOT contain cost or pricing information of any type.
- The proposal must NOT contain any qualification, limitation, or other restrictions.

The Proposal Evaluation Team will, then, review the Qualifications Evidence to determine if the mandatory requirement items are addressed as required and that it documents that the Proposer meets each mandatory qualification and experience requirement and is otherwise, at least, minimally acceptable as a contractor for the subject services.

PROPOSER LEGAL ENTITY NAME:		VersiFit Software, LLC

Proposal Page # (Proposer completes)	Item Ref.	QUALIFICATIONS EVIDENCE
9	6.2.1	Detail the name, e-mail address, mailing address, telephone number, and facsimile number of the person the State should contact regarding the proposal.
10	6.2.2	Provide the RFP Attachment 6.1., *Proposal Statement of Certifications and Assurances* completed and signed by an individual empowered to bind the Proposer to the provisions of this RFP and any resulting contract. The document must be signed without exception
9	6.2.3	Provide a statement, based upon reasonable inquiry, of whether the Proposer or any individual who shall perform work under the contract has a possible conflict of interest (*e.g.*, employment by the State of Tennessee) and, if so, the nature of that conflict. *Any questions of conflict of interest shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.*
9	6.2.4	Provide a statement of whether the Proposer or, to the Proposer's knowledge, any of the Proposer's employees, agents, independent contractors, or subcontractors, proposed to provide work on a contract pursuant to this RFP, have been convicted of, pled guilty to, or pled nolo contendere to any felony. If so, include an explanation providing relevant details. *Any issues relating to such a matter shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.*
9	6.2.5	Provide a statement of whether there is any material, pending litigation against the Proposer that the Proposer should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on the Proposer's financial condition. If such exists, list each separately, explain the relevant details, and attach the opinion of counsel addressing whether and to what extent it would impair the Proposer's performance in a contract pursuant to this RFP. *Any issues relating to such a matter shall be solely within the discretion of the State, and the State reserves the right to reject any proposal or cancel any award.* *All persons, agencies, firms, or other entities that provide legal opinions regarding the Proposer must be properly licensed to render such opinions. The State may require the Proposer to submit proof of such licensure detailing the state of licensure and licensure number for each person or entity that renders such opinions.*
9	6.2.6	Provide evidence that the Proposer is a Microsoft Certified Partner.
9	6.2.7	Provide evidence that the Proposer has previously implemented their data model in a K-12 Local Education Agency or State Education Agency.

Qualifications Evidence Guide Responses

Item Ref.	Response
6.2.1	Michael Restle, President, VersiFit Software, LLC 103 W. College Avenue, Suite 923 Appleton, WI 54911 Phone: 920-830-0102 Fax: 920-830-0304 restlem@versifit.com
6.2.2	See page 42 of this proposal for the *Proposal Statement of Certifications and Assurances*.
6.2.3	Neither VersiFit nor any individual who shall perform work for VersiFit under the contract has any possible conflict of interest in performing work for this project.
6.2.4	To VersiFit' s knowledge, none of our employees, agents, independent contractors, or subcontractors, proposed to provide work on a contract pursuant to this RFP, has been convicted of, pled guilty to, or pled *nolo contendere* to any felony.
6.2.5	There is currently no material, pending litigation against VersiFit that would adversely affect VersiFit's ability to meet contract requirements pursuant to this RFP. In fact, VersiFit has a 100% success rate with our implementations and we have never had any litigation against us in regard to any of our projects or implementations.
6.2.6	VersiFit is a certified Microsoft ISV Partner. Our member ID is 3299134, with an expiration date of 4/30/12.
6.2.7	VersiFit has successfully implemented the Edvantage SEA and LEA data models in two states (Oregon and Hawaii) and over 300 LEAs with a record of 100% success, and *every client is referential*. We offer five references, below, for your consideration. We also include five letters of recommendation in Appendix A. Following these references, we present in-depth responses to the Scope of Services portion of the Contract from the RFP.

References

OREGON DEPARTMENT OF **EDUCATION**

Oregon Department of Education
Contact
Joel Robe
255 Capitol Street NE
Salem, OR 97310
603-947-5709
Joel.Robe@state.or.us

Project Description
From October, 2006 to the present: Statewide data integration and longitudinal analysis system. Design, development, implementation, user training, and knowledge transfer. Currently providing ongoing maintenance, support, and enhancement services.

State of Hawaii, Department of Education

Contact
Allan Stone
6011 Kamokla Blvd, Suite 409
Kapolei, HI 96707
808-586-3222
Allan_Stone/ISSB/HIDOE@notes.k12.hi.us

Project Description
From December, 2009 to the present: Longitudinal Data System. Design, development, implementation, user and administrator training, and knowledge transfer. Currently providing ongoing maintenance, support, and enhancement services.

Chicago Public Schools

Contact
John DiCello
125 S. Clark Street
Chicago, IL 60603
773-553-1669
jdicello@cps.k12.il.us

Project Description
From August 2008 to the present: Data warehouse, dashboard, and report suite.
Design, development, implementation, user and administrator training, and knowledge transfer. Currently providing ongoing maintenance, support, and enhancement services.

Milwaukee Public Schools

Contact
Deborah Lindsey
P.O. Box 2181
Milwaukee, WI 53201-2181
414-475-8751
lindsedl@milwaukee.k12.2i.7us

Project Description
From January, 2006 to the present: Data Warehouse, Dashboard, and Report Suite.
Design, development, implementation, user and administrator training, and knowledge transfer. Currently providing ongoing maintenance, support, and enhancement services.

Portland Public Schools

Contact
Marita Ingalsbe, Director, Applications IT Services
501 North Dixon Street
Portland, OR 97227
503-916-3136
ingalsbe@pps.k12.or.us

Project Description
From May, 2006 to the present: Data Warehouse, Dashboard, and Report Suite.
Design, development, implementation, user training, and knowledge transfer. Currently providing ongoing maintenance, support, and enhancements services.

Scope of Services

VersiFit responses are in dark blue font.

A. SCOPE OF SERVICES:

A.1.   The Contractor shall provide all service and deliverables as required, described, and detailed herein and shall meet all service and delivery timelines as specified by this Contract.

VersiFit has the technology and the resources to ensure the completion of all deliverables as outlined in the RFP, within the allotted time.

VersiFit has over 400,000 hours of experience working with K-12 education clients to build state, regional, and district Educational Data Management Systems. Every VersiFit resource will have at least six years of Longitudinal Data Warehouse, Dashboard, and Reporting system development and implementation experience in education; most of our resources have 12 years of such experience. *No other firm will bring this level of education domain knowledge and experience to your project.*

A.2.   The Contractor shall provide a P-12 longitudinal data system (LDS) Early Warning Data System (EWDS). The EWDS will be a set of dashboards to assist school principals and teachers in monitoring student performance and outcomes. Students with potential risk of not succeeding based on defined leading indicators will be identified so that early intervention strategies can be targeted to the students most in need. The initial set of leading indicators will be based on attendance, behavior and course completion. Additional indicators are anticipated in subsequent years.

VersiFit will provide a P-12 Longitudinal Data System (LDS) and Early warning Data System (EWDS), that will include a set of dashboard pages, at risk condition metrics, a guided analysis solution, at risk guided analysis, diploma requirements on-track/off-track monitoring, credit recovery and college readiness measurement.

The Edvantage Early Warning Data System is an advanced analytic solution that combines all of the best features of a longitudinal data system with applied research to promote early detection of students that are not likely to graduate without district interventions. Early Warning student and factor information is easily accessed using a secured dashboard with many key performance indicators (metrics) & at risk reports.

A.3. Annual Work Plan. The Contractor shall prepare, for State approval, a detailed Work Plan for each deliverable (A.5- A.9) that incorporates the development of schedules for the activities of this contract. The Work Plan shall include the steps for all project work tasks and deliverables including initiation and completion dates, task responsibilities to avoid any disruption of services, requirements or deliverables to the State.

The Annual Work Plan will outline by task and due date each activity to be performed under this contract. The Annual Work Plan must describe all activities related to the development and implementation of each item listed in this Scope, including each stage of production. It shall provide due dates for each activity and indicate areas of responsibility for the Contractor and the State. The Annual Work Plan will serve as a monitoring document to be used by the State to assure timely completion of tasks as scheduled.

The initial Annual Work Plan shall be due to the State within thirty (30) days of the execution of this contract. Subsequent Annual Work Plans will be due no later than June 1 prior to the effective fiscal year.

VersiFit will prepare the annual work plan for State approval according to item A.3 using either Microsoft Project and/or Microsoft Excel to meet the LEA LDS and Early Warning System objectives.

VersiFit adheres to the proven Project Management Institute (PMI) PMIBOK Project Management Methodology which includes the "Develop Schedule" process, which involves the development of an effective schedule (Work Plan). If the State of Tennessee approves, VersiFit will develop work breakdown structures (WBS) for each of the major deliverables according to the PMI Plan Process group objectives and we will then load them into the annual project plan.

"Develop Project Management Plan is the process of documenting the actions necessary to define, prepare, integrate, and coordinate all subsidiary plans. The project management plan defines how the project is executed, monitored and controlled, and closed. The project management plan content will vary depending upon the application area and complexity of the project. The project management plan is developed through a series of integrated processes until project closure." *A Guide to the Project Management Body of Knowledge (PMBOK GUIDE)* Fourth Edition, 2008, p. 78.

"Develop Schedule is the process of analyzing activity sequences, durations, resource requirements, and schedule constraints to create the project schedule. Entering the activities, durations, and resources into the scheduling tool generates a schedule with planned dates for completing project activities. Developing an acceptable project schedule is often an iterative process. It determines the planned start and finish dates for project activities and milestones. Schedule development can require the review and revision of duration estimates and resource estimates to create an approved project schedule that can serve as a baseline to track progress. Revising and maintaining a realistic schedule continues throughout the project as work progresses, the project management plan changes, and the nature of risk events evolves." *A Guide to the Project Management Body of Knowledge (PMBOK GUIDE)* Fourth Edition, 2008, p. 152.

A.4. P-12 LDS/Early Warning Data System Architecture

    a.   The Contractor shall provide a system that is deployable to a Microsoft.NET Application Server on Windows Server 2008 hosted at the state data center running Secure Socket Layer (SSL) mode.

The P-12 LDS and At Risk Early Warning Data System Architecture is in production at numerous Microsoft.NET Application Server installations on Windows Server 2008 hosted at the state data center running SSL and will be implemented for the Tennessee Department of Education.

VersiFit will use its Microsoft technology version for the customization and implementation of the VersiFit Early Warning Data System and the VersiFit Edvantage Longitudinal Data System. SQL and TSQL are used for development, configuration, and customization of the Solution. We will use the .Net framework both VB and C+, and Microsoft Transact-SQL. Many of the Microsoft development and monitoring tools will be used in the development of the Edvantage LDS including Visual Studio and Performance Monitor.

b. The Contractor shall provide a data model that is deployable on MS-SQL Server 2008 R2 Enterprise Edition or higher as the database standard and hosted at the state data center.

The Edvantage data model is in production at numerous MS-SQL Server 2008 R2 Enterprise Edition databases, utilizing MS BI and reporting tools.

VersiFit will use Microsoft technology to customize the VersiFit At Risk Early Warning Data System and the VersiFit Edvantage Longitudinal Data System. SQL and TSQL are used for development, configuration, and customization of the Solution. We will use the .Net framework both VB and C+, and Microsoft Transact-SQL. The Microsoft development and monitoring tools will be used in the customization of the Edvantage LDS including Visual Studio and Performance Monitor.

c. The Contractor shall provide a system that utilizes the Microsoft business intelligence and reporting tools.

The VersiFit Edvantage LEA Longitudinal Data System and Early Warning Data System leverages the full Microsoft Business Intelligence software technology stack, including MS Reporting and Analysis Services, MS SSIS & Transformation Services, and MS SharePoint and PerformancePoint, to serve data to the consumer in a user-friendly, secure capacity. The data becomes information for the consumer by its transformation (using SQL stored procedures or SSIS) into an appropriate format with the correct level of detail, graphics, and drill through capability.

A.5. Base K-12 data model and reporting

a. Requirements:

(1) The Contractor shall provide a K-12 data model for implementation, at the state level, capable of accommodating 136 Local Education Agencies (LEAs), 1900+ schools, 4000+ principals and administrators, 70,000+ teachers and 1,000,000+ students in Tennessee's K-12 public schools.

The Edvantage K-12 data model and solution is the most comprehensive data model available by any vendor and will easily accommodate 136 LEAs, 1900+ schools, 4000+ principals and administrators, 70,000+ teachers, and 1,000,000+ students.

The Tennessee Department of Education will not have any difficulty with system scalability: Edvantage has been refined and tuned over twelve years and

has numerous longitudinal data system features that promote scalability, including:

- The Edvantage solution analytical data model design using federated data warehouse architecture, follows the mature star-schema design approach utilized by the predominant business intelligence community. Developers have used this design for more than 30 years because of its high-performance characteristics. It is considered the optimal design for very large data sets. There are a variety of steps that may be taken to support data growth, but increased indexing and partitioning of the data (typically by school year) are the most common and the latter is supported with the proposed solution (although additional disk arrays would be recommended).

- The extract, transform, and load (ETL) processes have proven scaling capabilities. The proposed SQLServer Integration Services ETL has been implemented by VersiFit in school districts/regions/states from 10,000–700,000 active students and is more than capable of handling over 1 million students. The initial deployment only uses modest multi-threading and parallelization. Both the threads can be increased and tasks can be more parallelized within the metadata to provide some throughput increases.

- Scalability can be easily managed within the host environment because the solution is a browser-based solution with the workload on the server.

- To allow their systems to grow and evolve with the increased data load or changing environments, the embedded reporting and analysis software is built with service oriented architecture (SOA) in a multi-tiered web-services architecture. It can be scaled vertically or horizontally to meet performance requirements.

- The technology will automatically use the hardware optimally. For example, it will detect the processors and automatically add threads to ETL processes to maximize the available hardware.

- The embedded reporting and analysis software: Microsoft SharePoint/PerformancePoint, Microsoft Analysis Services, and Microsoft Reporting Services are used by some of the largest public- and private-sector organizations with tens of thousands of users and data volumes far exceeding anything else possible in the K–12 educational sector.

As evidence of our solution's ability to scale, Edvantage is in production for the State of Oregon and the State of Hawaii, as well as Chicago Public Schools, and many education service providers with multiple district implementations.

(2)   The Contractor data model shall include:

a.   District Level Data:

   i.   District demographic data, district calendar data and district calendar events

    ii.   Must allow for multiple district calendars within a district for a specific year

  b. School Level Data:

    i.   School demographic data, school calendar data, school calendar funding periods, school calendar events

    ii.   Must allow for multiple school calendars for a specific year

  c. Class Level Data:

    i.   State course code, local course section identifier and class schedules

    ii.   Must allow for a class to be attached to a specific school calendar for a specific school year

  d. Student Level Data:

    i.   Student demographic data, student enrollment data, student attendance, student disciplinary actions, student special education data, student grade assignment, student class assignments, student class grades, student classifications, student federal program indicators, student withdrawal information, student end of service information, student graduation data

    ii.   Must allow for a concurrent student enrollments for home school and for service school (primary and service enrollment types)

  e. Staff Level Data:

    i.   Staff demographic data.

    ii.   Allow for multiple staff current assignments

    iii.   Allow for multiple class assignments

  f. Role level security:

    i.   State user level

        1. May access data for all districts and schools

    ii.   District user level

        1. May access data for all schools in their district

        2. May access district level data within their district

    iii.   School user level

        1. May access all data for their school

    iv.   Teacher level

        1. May access their class and student data

The Tennessee Department of Education will receive the premier and most comprehensive data model and Edvantage LEA LDS available. VersiFit's Edvantage LEA LDS and Early Warning Data System will include District Level Data, School Level Data, Class Level Data, Student Level Data, Staff Level Data, and Role Level Security.

The Edvantage LEA data model includes more than 3,000 data attributes, almost 50 data marts (domains), and extensive metadata and is easily customized by the Tennessee Department of Education to meet your unique requirements. Edvantage includes *district and school demographics, district, school, school funding and school events calendars, NCES, state, and local course codes, enrollments, attendance both positive and negative, period attendance, formative and summative assessment data, school, teacher and student class assignments, teacher student linkages, six financial data marts, at risk, student graduation, diploma tracking, credit recovery and remediation, college, teacher evaluations, teacher recruiting, teacher professional development, teacher evaluation framework, balanced scorecard, school improvement cohorts, etc.*

The Edvantage At Risk Early Warning Solution is an advanced analytic solution that combines all of the best features of a longitudinal data system with applied research to promote early detection of students that are not likely to graduate without district interventions. At Risk student and factor information is easily accessed using a secured dashboard with many key performance indicators (metrics) and at risk reports.

Features include:

- Advanced analytics
- Basic Research Results
- Dashboard with 20 pages of content
- Key Performance Indicators more than 100 KPIs
- More than 160 Reports
- Longitudinal Data Warehouse
- Data Integration ETL
- Data Quality Monitor

At Risk/Early Warning data includes:

- Attendance
- Academics
- Behavior
- Formative & Diagnostic Assessments
- Intervention/Program Participation
- Program and Intervention Effectiveness
- Social Services

At Risk Metrics include:

- Attendance Unexcused Absences
- Marks D's & F's Core Subjects
- Behavior Referrals
- Off-track Credits
- Low GPA
- Student Mobility
- Social Services Conditions

At Risk Reports include:

- At Risk (Watch List)
  - Attendance
  - Academics
  - Behavior
  - Social Services
- Intervention Participation
- Intervention Results
- Alerts
- Workflow

At Risk Hierarchies include:

- Organization
  - District
  - School
  - Grade
  - Classroom
- Teacher–Student
  - School
  - Teacher
  - Student
  - Subject & Course

At Risk Targeted Users include:

- School Board Members
- Superintendent
- Executive Management
- Finance & Accounting
- Area Instructional Officers
- Principals

Security includes:

- Roles
- Organization
- Account Levels
- LDAP, AD, Custom

User Interactions include:

Web-based financial metrics and reports are easily accessible. Problem-solving business intelligence features are included, such as drill-down to greater levels of detail and ad-hoc filters to view only the information you need.

g. Dashboards and metrics

  i.   Ability to create dashboards for all security role   levels

  ii. Provide a summary of all students by high risk, low risk, and performing at good levels

iii. Ability to drill down on any category and display a list of students in that category

iv. Ability to drill down on a selected student and display details about that student

v. Ability to display warning using attendance, disciplinary, and grade data

VersiFit's Edvantage At Risk and LEA dashboard, metrics, and reports have the capabilities listed above in g.i through v.

VersiFit Dashboards and metrics operate on all security role levels and have the ability to summarize students by high risk, low risk, and performing at good levels. Drill down, drill across, and drill through are possible on any category, and on selected students.

Edvantage includes the Microsoft SharePoint/ PerformancePoint Dashboard, Microsoft Analysis Services, and Microsoft Reporting Services Business Intelligence tools. Graphical views are available in the 2010 release of the Microsoft Business Intelligence software. The Dashboard and reports will include:

- Line charts • Gauges
- Pie charts • Scatter plots
- Vertical bars • Bubble graphs
- Horizontal bars • Area
- Dials • 3-D charts

The Edvantage tools are graphically rich and offer annotation and customization options such as base or trend lines, resizing, printable versions, titles, labels for axes and data points, font formatting, color schemes, and key areas. Microsoft PerformancePoint supports the changing of the graphical view and the addition of attributes for cross domain analysis. Reporting Services supports more graphical formats but supports limited personalization.

h. Provide installation and configuration documentation

VersiFit will provide extensive installation and configuration documentation as well as comprehensive metadata.

Complete documentation is included with every installation. Included are comprehensive administrator, developer, and user guides for the Edvantage At Risk Dashboard. Technical & administrative documentation is provided for the data model and ETL. Some items included within the technical guides are:

- Infrastructure Considerations
- Microsoft SQLServer Installation Considerations
- Environment Installation and Configuration
- Database
- Dashboard
- Reporting
- Data Warehouse Build Procedure
- Build Procedure Troubleshooting

- Backup/Recovery
- SSIS Upgrades
- Database Upgrades
- Edvantage Upgrades
- Supporting Data Warehouse Administration Documentation:
- Infrastructure Worksheet
- Data Flow Diagram
- Metadata Diagram
- ERD Diagram
- Windows Administration
- Print ETL Package Build Dependency Diagram

b.   Administrative Activities: The Contractor shall provide all services from testing to implementation to carry out the scope of the contract.

VersiFit will integrate the Tennessee Department of Education approach with the Project Management Institute PMI PMBOK proven project management methodology and the VersiFit Project Execution Methodology to provide all services, from testing to implementation, to carry out the scope of the contract and implement the P-12 LDS Early Warning Data System. The PMI and VersiFit approach has led to our 100% success rate over twelve years.

The Contractor shall develop, produce, and deliver materials to facilitate the schedule for implementation of the System. All administrative materials shall be provided to the State in Microsoft Word and/or Excel for use on the State internet or in training.

VersiFit will use the PMIBOK guidelines to develop and maintain a project plan and to develop, produce, and deliver materials to facilitate the schedule for implementation of the System. All administrative materials will be provided to the State in Microsoft Word and/or Excel for use on the State internet or in training.

The instructional and administrative materials provided by VersiFit are customizable. These documents can be added to on-line references or added as help pages through links within the Edvantage solution.

(1)   Security Procedures: The Contractor shall provide detailed, standardized security procedures for review and approval by the State. Approved security procedures shall be included in the Work Plan. The procedures must:

(2)   Define a secure architecture to protect processing, storing, and reporting environments from network-based attacks.

(3)   Provide security procedures and safeguards to ensure that electronic files and data are developed, used, and maintained in a secure manner to protect the confidentiality of all personally identifiable information

(4)   Utilize encryption to ensure security of all director/supervisor/ school/system information entered through all online programs.

(5)   The Contractor is held responsible for the actions of its team and must guard against a breach of security.

VersiFit has passed multiple independent security audits including one recently

for Chicago Public Schools. Edvantage security can integrate security entries from multiple sources real-time if necessary and Edvantage security features make maintenance of security fast and easy.

Included with the Edvantage solution are web-based administration tools for security administration and local administration. The following functions can be performed with these tools:

- Defining user roles, groups, and access rights with LDAP or AD for objects such as folders, reports, and even field values
- Scheduling and monitoring events for analytical content distribution and management
- Assigning and maintaining users
- Backup and recovery of all databases and repositories
- Monitoring table sizes (can be done through triggers and notifications)
- Monitoring success/failures of ETL process (can be done through events and notifications)
- Monitoring system utilization for performance tuning, debugging and assuring FERPA compliance
- Monitoring and managing memory
- Applying and testing upgrades

Edvantage conforms to the business intelligence (BI) best-practices for security and offers the foremost data quality technology available, complying with FERPA and HIPAA privacy and security standards.

The security framework of the Edvantage SEA/LEA Longitudinal Data System allows for access to data to be restricted at all of the required levels:

- Content (reports and analyses)
- Domain (subject areas)
- Entity (table)
- Class (group of elements)
- Element (column)
- Row levels

Data access can be restricted at user or group levels.

The VersiFit Edvantage SEA Longitudinal Data System security framework will be configured to support multiple levels of access to aggregate level metrics and data. It will restrict student-level (row-level) data access.

The VersiFit Edvantage SEA Longitudinal Data System version is the only mature and proven multi-district solution running on a single instance of a database. As a result, our SEA version security is thoroughly proven to support multiple administrative security domain levels. For example, the SEA can administer all users and a Local Education Agency (LEA) administrator can administer users for their respective district.

We will comply with all Tennessee security policies, guidelines, and procedures. These policies would be examined during our project's discovery

phase. Security workshops and detailed requirements will be prepared from this review. All reporting and analysis features of the VersiFit Edvantage SEA Longitudinal Data System are designed to comply with the stringent security protocols of federal agencies, insurance companies, and healthcare organizations.

The Edvantage SEA Longitudinal Data System security role creation and user assignment interface has the functionality to configure multiple roles at the same time and multiple users to a role. More than one role can have permissions to a report granted or revoked in the same action. During the discovery security review and requirements workshop we would examine these security requirements. We will use the security interface to meet Client's requirements and the Client IT Security Administrator would be trained to use the interface. The roles for multiple groups can be modified simultaneously and multiple groups can have permissions.

The VersiFit Edvantage solution includes web-based administration tools for security administration and local administration. The following functions can be performed with these tools:

- Defining user roles, groups, and access rights with Lightweight Directory Access Protocol (LDAP) or Active Directory (AD) for objects such as folders, reports, and even field values
- Scheduling and monitoring events for analytical content distribution and management
- Assigning and maintaining users
- Backup and recovery of all databases and repositories
- Monitoring table sizes, which can be done through triggers and notifications
- Monitoring success/failures of ETL process, which can be done through events and notifications
- Monitoring system utilization for performance tuning, debugging and assuring FERPA compliance
- Monitoring and managing memory
- Applying and testing upgrades
- Monitoring success/failures of ETL process, which can be done through events and notifications
- Monitoring and organizing content as required

c.   Quality Control: The Contractor shall provide detailed, standardized, quality control procedures for review and approval by the State. Approved quality control procedures shall be included in the work plan. The Contractor shall provide quality control measures including the following:

   (1)   Errors in work products arising from activities that are the responsibility of the Contractor including print errors and program functions. Such corrections may involve activities that include the following:

       i.   Conduct analyses to identify the cause and extent of errors.

       ii.   Edit, revise, and/or reprogram online applications.

iii.   Reprint and/or reproduce products or other materials.

v.   Replace and/or correct data files.

vi.   Reproduce reports

vii.   The State will conduct a rigorous acceptance test of the system prior to initial installation. The contractor shall support this testing effort as required by the State.

During the project, VersiFit will apply best practices for quality management as defined by the Project Management Institute (PMIBOK), which includes the critical design reviews, readiness for implementation review, and project close-out review. In addition, to the Project Management method and related best practices for Quality Management, the VersiFit Edvantage LDS includes a Data Quality System; however, VersiFit consultants will also work with Client to include additional data quality reports and queries to support data validation. These requirements will be determined during the Discovery phase at the Data Quality Review and Requirements workshops where we discuss data consistency, data quality, and data timeliness concerns.

Special attention will be paid to the business rules associated with cleansing, consolidating, validating, and transforming the data that are used by the extract, transform, and load (ETL) process. These business rules are stored in the metadata so they can be readily changed as the educational analytical needs change.

Quality Control serves to ensure the quality and integrity of business intelligence projects and products. This function validates system-generated calculations and information as well as reporting by internal business intelligence resources. Quality control and risk management substantiates the adequacy and consistency of quality standards for all business intelligence-related activities. The process involves the development of policies and procedures to ensure appropriate levels of data availability and security across all user organizations. Quality control functions include:

- Audit, pre- and post-implementation, of new systems
- Review and analysis of system integrity, data integrity, and data flows
- Review and revise systems documentation as necessary from the audit/quality standpoint
- Validate the accuracy of system-generated calculations and information
- Review of system designs to ensure the accuracy and integrity of proposed systems
- Develop, implement and enforce quality standards policies, and procedures for all business intelligence related activities
- Review project plans for reasonableness and completeness
- Enforce standards and quality levels for all business intelligence (BI) systems development and systems maintenance projects
- Develop, implement and review appropriate levels of security for application and system software including system and data access and

privileges, sign-on policies and procedures, and outside access to internal information

- Develop, maintain, and test contingency and back-up plans including disaster recovery
- Establish virus prevention procedures, including firewall protection
- Establish redundant system configurations for fail over purposes.

d. Operations Management Activities

(1) Project Team: The Contractor shall assign a single point of contact for this program to manage all inquiries related to the system. Sub-contractors used to perform services for the Contractor under this contract must provide the State information pertaining to personnel and agree to the terms of this section.

2) All members of the Contractors project team must have at a minimum technical experience, knowledge, and operational experience in the following areas:

    i. managing or coordinating the development and implementation of large web based applications and databases,

    ii. communicating effectively both orally and in writing,

    iii. managing large scale data integration systems

(3) The Contractor shall provide a personnel roster and resumes of project team members who shall be assigned to perform duties or services under this Contract.

(4) The Contractor shall not remove or reassign key personnel (including: Program Manager, Project Manager, Project Coordinator, Software Project Manager, Lead Software Developer, and other personnel in Lead or Director level positions) without prior written approval of the State.

(5) The Contractor shall provide qualified replacements in the event that key personnel become unavailable to provide services due to resignation, illness, or other factors outside of the Contractor's control. The Contractor shall provide the State with written notice immediately upon determination of the need for replacement personnel. The Contractor shall provide the State with written notification and the resume or vitae of all personnel proposed for the project team for review and written approval, for which approval shall not be unreasonably withheld.

(6) Continuity of Contracts: The Contractor shall maintain the established project team, especially the Project Coordinator and other key lead personnel through the end of the contract, including completion and delivery of all services and deliverables, to work with the State to ensure a smooth and seamless transition.

VersiFit will comply with all of the Operations Management Activities listed above. VersiFit will assign a single point of contact for this program to manage all inquiries related to the system: this point of contact will be Debbie O'Connor, the VersiFit Director of Professional Services. Debbie's resume as well as the resumes of the key project resources are provided below.

To manage project resources, VersiFit will use the proven Project Management Institute PMI PMBOK project management methodology and the VersiFit Project Execution Methodology to implement the P-12 LDS Early Warning Data System. The PMI and VersiFit approach has led to our 100% success rate over twelve years.

Every VersiFit resource will have at least 6 years of education LDS development and implementation experience, and most resources will have 12 years of such experience. VersiFit offers the following resources as members of this project.

	Name/Title	Type of Work Performed
	Debbie O'Connor Project Manager & Implementation Lead	Responsible for all activities associated with transition from project to production status. ***Single Point of Contact***
	Brian Pritzl Technology Lead	Responsible for developing and maintaining the logical and physical data models; defining the data structures; ensuring overall data quality of all data models, etc.
	Steve Westerhouse Database Administrator	Responsible for defining the Operations architecture for the database.
	Jason Hildebrandt ETL Specialist	Extraction, transformation and loading (ETL) expert, responsible for the data quality of the ETL architecture.
	Josh Meyer ETL Specialist	Extraction, transformation and loading (ETL) expert, responsible for the data quality of the ETL architecture.
	Geoffrey Groskreutz Security Specialist	Lead web developer on VersiFit's business intelligence practice and has developed a wide variety of database-driven, browser-based solutions for both transactional and analytical applications.

	Charles Breithaupt Functional Lead/Education Analyst	Functional Design Lead that will work with the Tennessee Department of Education to design custom At Risk and LEA Dashboard and Report Content.
	Daniel Piotrowski Reporting Specialist	Responsible for report detailed design. Responsible for report development, unit testing, and implementation.
	Dalida Jongsma Data Quality Lead/Analyst	Responsible for performing Data Quality Assessment processes; leading the DQA results analysis; and assisting system and User Acceptance Test activities, etc.

Resumes

Debbie O'Connor	**Project Manager and Implementation Lead**
Education	BA Public Accounting, Illinois Wesleyan University Additional Coursework toward Special Degree in MIS, University of Wisconsin-Milwaukee
Certification	CPA Certification
Areas of Expertise	Cognos, Business Objects XI, Active Server Pages, Oracle
Background	Before joining VersiFit, Ms. O'Connor spent 6 years in industry managing custom development teams and projects for a Fortune 500 company. In this role, she managed 14 ASP web applications throughout the entire lifecycle from building to maintenance, including one global, multi-lingual application. Additionally, she led the effort to design and build a Data Mart for the Risk Management department.
Relevant Experience	Oregon Department of Education – Reporting Lead-Gathered requirements and facilitated design for approximately 120 Business Objects XI reports. Participated in development as well. Mr. Joel Robe, KIDS III Regional Project Manager Oregon Department of Education 255 Capitol Street NE, Salem, OR 79310 503-947-5709 Newport News, VA Public Schools – Project Manager for 9-month implementation of our Edvantage product. Project was brought in 500 hours under budget and on time. Steve Soderholm, Data Warehouse Project Manager Newport News Public Schools 12465 Warwick Blvd., Newport News, VA 23606 757-881-5461, ext 106

Milwaukee Public Schools – Led data profiling sessions with customer and participated in data model design activities.
Deborah Lindsey, Director, Accountability & Assessment
Milwaukee Public Schools
P.O. Box 2181, Milwaukee, WI 53201-2181
414-475-8751

Tulsa Public Schools – Project Manager/Analyst, Data Warehouse, Dashboard, and Reporting Suite.
Mr. Joe Jennings, Director of Initiatives Management
Tulsa Public Schools
3027 South New Haven Avenue, Tulsa, OK 74114-6131
918-746-6428

Brian Pritzl	Technology Lead
Education	MA Humanities, Speech, Univ. of Wisconsin-Oshkosh Graduate College BS Communications, Univ. of Wisconsin-Oshkosh College of Speech
Certification	MCP, Business Objects Certified, Hyperion Certified
Areas of Expertise	Design and management of business (R) solutions, including Analytical database models using a variety of approaches (such as dimensional modeling); Reports & analytical applications utilizing packaged inquiry, reporting and analysis tools (e.g. Business Objects 5i and Web(R) 2.6, Brio. Enterprise 6x, etc.), and desktop productivity tools (such as Microsoft Access and Excel); Utilization of high-end statistical packages such as SPSS to perform data mining and sophisticated analyses.
Background	Mr. Pritzl has more than 11 years of experience as the Lead Designer of the Edvantage data warehouse. He is the Senior Vice President of VersiFit, LLC.
Relevant Experience	Oregon Department of Education – Lead Architect, KIDS II Project, Statewide Data Integration and Longitudinal Analysis System Mr. Joel Robe, KIDS III Regional Project Manager Oregon Department of Education 255 Capitol Street NE, Salem, OR 79310 503-947-5709 Hillsboro Public Schools – Lead Architect/Project Manager, Data Warehouse, Dashboard, and Reporting Suite Implementation James Harrington, Chief Information Officer Hillsboro Public Schools 3083 Northeast 49th Place, Hillsboro, OR 97124 503-844-1535 Highline Public Schools – Lead Architect, , Data Warehouse, Dashboard, and Reporting Suite Implementation Mark Finstrom, Director Highline Public Schools 15675 Ambaum Blvd. SW, Burien, WA 98166 206-433-2217

Steve Westerhouse	Database Administrator
Education	BS Computer Science, Professional Emphasis, University of Wisconsin-Oshkosh
Certification	Business Objects Enterprise
Areas of Expertise	MS SQL Server DBA, Oracle PL/SQL Developer, Programming Languages: C# and .NET Framework, C, C++, Delphi, Java, JavaScript, Desktop development in MS Access and Crystal Reports. ETL and data replication tools such as Informatica Power Center, Ascential Data Stage Microsoft DTS, Business Objects Data Integrator, Data Mirror Transformation Server and Data Flux dfPower Suite. ER Studio data modeling tool
Background	Mr. Westerhouse has ten years of software design and development experience, including the creation of dozens of transactional and analytical applications and data warehouse solutions. He is a lead software architect at VersiFit and provides technical direction to the other developers & DBAs.
	Mr. Westerhouse is a lead developer on VersiFit's Business Objects team with 8 years of experience, and certifications on the Crystal and Business Objects Enterprise products. He is experienced in extending and integrating the Business Objects software suite utilizing ASP, JSP, or Web Services.
	Mr. Westerhouse is the data replication, extraction, transformation/cleansing and loading expert in VersiFit's business intelligence practice and has built analytical data models for a wide variety of applications both analytical and operational in nature.
	He has extensive programming and administrative experience with Microsoft SQL Server and Oracle Database platforms and is fluent in TSQL and PL/SQL. He speaks before IT groups on these databases and their features.
	Mr. Westerhouse is an expert in design, modeling, and implementation of dimensional star schemas as well as normalized transactional data models.
Relevant Experience	Columbus Public Schools – Implemented student data warehouse in Oracle 8i and in Oracle 9i. Designed & developed custom routines to automate data warehouse building procedures. Created a client application to upload external student data from text files into a staging area and then database procedures to merge the staged data into the data warehouse.
	Oregon Department of Education – ETL Lead, Statewide Data Integration and Longitudinal Analysis System Mr. Joel Robe, KIDS III Regional Project Manager Oregon Department of Education 255 Capitol Street NE, Salem, OR 79310 503-947-5709
	Tulsa Public Schools – ETL Lead, Data Warehouse, Dashboard, and Reporting Suite Implementation

Mr. Joe Jennings, Director of Initiatives Management
Tulsa Public Schools
3027 South New Haven Avenue, Tulsa, OK 74114-6131
918-746-6428

Milwaukee Public Schools – ETL Lead, Data Warehouse, Dashboard, and Reporting Suite Implementation
Deborah Lindsey, Director, Accountability & Assessment
Milwaukee Public Schools
P.O. Box 2181, Milwaukee, WI 53201-2181
414-475-8751

Jason Hildebrandt	ETL Specialist
Education	BS Computer Science, Professional Emphasis, University of Wisconsin-Oshkosh
Certification	MCDBA, Business Objects Certified Developer, Brio.Enterprise Certified
Areas of Expertise	MS SQL Server DBA, Programming Languages: C, C++, C#, VB.NET, Delphi, ASP/JSP, JavaScript, desktop development in MS Access and Crystal Reports. Business Intelligence Tools: Business Objects 5i and WebIntelligence 2.6, Brio.Enterprise 6x
Background	Jason has over six years experience designing and developing both browser-based and client-server reporting and decision-support applications. Jason is a core member of VersiFit's business intelligence practice.
	Jason is the lead developer for VersiFit's portal projects and has experience with SharePoint, Rainbow and IBS, Brio.Portal, RightNow Knowledgebase Portal and the Business Objects InfoView Portal. Jason has also developed custom portals in ASP and ASP.NET.
	Jason is a certified Business Objects developer and has participated in advanced seminars on extending and integrating Business Objects & WebIntelligence utilizing ASP, JSP and the Business Objects SDKs. Jason has built Business Objects Universes and advanced reporting solutions for both manufacturing and service clients.
	Jason is a certified Brio applications developer. He has developed Brio data models and analytical applications for both manufacturing and service clients.
Relevant Experience	St. Norbert College – Development of a custom reporting portal in JSP. Deployment of Business Objects/WebIntelligence as the new enterprise reporting solution. Development of complex Universes connecting directly to new ERP system and advanced documents for financial reporting & analysis.
	Lawrence University – Lead developer for an admissions & performance reporting & analysis solutions in Brio.Enterprise which integrated with the SCT Banner OLTP software and the university's Intranet.
	Oregon DOE – ETL Developer: Responsible for data quality of the

ETL architecture; ensuring ETL models are properly developed and maintained; designing all ETL interfaces, etc.
Mr. Joel Robe, KIDS III Regional Project Manager
Oregon Department of Education
255 Capitol Street NE, Salem, OR 79310
503-947-5709

Highline Schools – ETL/Dashboard Developer, Data Warehouse, Dashboard, and Reporting Suite Implementation
Mark Finstrom, Director
Highline Public Schools
15675 Ambaum Blvd. SW, Burien, WA 98166
206-433-2217

Portland Schools – ETL Developer, Data Warehouse, Dashboard, and Reporting Suite Implementation
Nick Jwayad, Chief Technology Officer
Portland Schools
501 North Dixon Street, Portland, OR 97227-1804
503-916-3415

Josh Meyer	ETL Specialist
Education	BS Computer Information Systems, University of Wisconsin-Oshkosh
Areas of Expertise	MS SQL Server DBA, Java, C, C++ C#, VBNET, Oracle, ASP/JSP, MS SSIS.
Background	Mr. Meyer has over four years experience with custom SQL development, Java development, and ETL within Stored Procedures.
	Mr. Meyer has focused on development of ETL within stored procedures for numerous school districts for VersiFit, such as Columbus, OH, Chicago, IL, the Oregon Department of Education, and Milwaukee Public Schools.
Relevant Experience	Oregon Department of Education – ETL Developer, Statewide Data Integration and Longitudinal Analysis System
	Mr. Joel Robe, KIDS III Regional Project Manager
	Oregon Department of Education
	255 Capitol Street NE, Salem, OR 79310
	503-947-5709
	Milwaukee Public Schools – ETL Developer, Data Warehouse, Dashboard, and Reporting Suite Implementation
	Deborah Lindsey, Director, Accountability & Assessment
	Milwaukee Public Schools
	P.O. Box 2181, Milwaukee, WI 53201-2181
	414-475-8751
	Chicago Public Schools – ETL Developer, Data Warehouse, Dashboard, and Reporting Suite Implementation
	John DiCello
	Chicago Public Schools
	125 S. Clark Street, Chicago, IL 60603
	773-553-1669

Geoffrey Groskreutz	Security specialist
Education	BS Computer Science, MIS Emphasis, University of Wisconsin-Oshkosh (Graduated Cum Laude)
Certification	CNE, Business Objects Developer
Areas of Expertise	Oracle & MSSQL database development, Programming Languages: ASP (classic & .NET), JSP, JavaScript, JAVA, C#, Delphi, Pascal, Visual Basic (classic & .NET), Desktop development in MS Access and Crystal Reports. Business Intelligence Tools: Business Objects / WebIntelligence, Microsoft Analysis Services.
Background	Mr. Groskreutz has seven years experience designing and developing browser-based and client-server line-of-business and decision-support applications. Mr. Groskreutz's focus for the last five years has been browser-based business intelligence and portal solutions.
	Mr. Groskreutz is the lead web developer on VersiFit's business intelligence practice and has developed a wide-variety of database-driven, browser-based solutions for both transactional and analytical applications. Mr. Groskreutz is an experienced Business Objects SDK developer with several successful integrations to his credit.
Relevant Experience	St. Norbert College – Development of a campus-wide reporting portal in JSP, Apache & Oracle. The portal was integrated with St. Norbert's SCT Banner ERP system and their Business Objects reports.
	Columbus School District – Development of several Student Information data marts for inclusion in the federated data warehouse. Development was done in Oracle 9i utilizing PL/SQL and other Oracle utilities.
Charles Breithaupt	Functional Lead/Education Analyst
Education	MBA Regis University BS Business Administration, Marquette University
Areas of Expertise	Project Manager and Senior Solution Architect.
Background	Mr. Breithaupt has over 24 years of management and technology consulting and practitioner experience, including 4 years as a Senior Manager in the Milwaukee office of Ernst & Young. He has also worked for 7 years as a Corporate Controller and Chief Financial Officer. Mr. Breithaupt worked for Oracle Consulting Services as a Practice Director leading the North Central region Business Intelligence and Data Warehouse practice.
Relevant Experience	Oregon Department of Education – ODE KIDS LDS Phase II Project Lead. He has directed and served as the Education Analyst for the largest and most complex SEA and LEA engagements. He is the primary content designer for the Edvantage SEA and LEA Dashboard and reports. Mr. Joel Robe, KIDS III Regional Project Manager Oregon Department of Education 255 Capitol Street NE, Salem, OR 79310 503-947-5709 Portland Public Schools – Project Manager/Functional Lead, Data

Warehouse, Dashboard, and Reporting Suite Implementation. Responsible for successful completion of the project, preparation and communication of project status, management of resources and oversight on project fees, milestones, change management, etc.
Nick Jwayad, Chief Technology Officer
Portland Schools
501 North Dixon Street, Portland, OR 97227-1804
503-916-3415

Milwaukee Public Schools – Project Manager/Analyst, Data Warehouse, Dashboard, and Reporting Suite Implementation. Responsible for successful completion of the project, preparation and communication of project status, management of resources and oversight on project fees, milestones, change management, etc.
Deborah Lindsey, Director, Accountability & Assessment
Milwaukee Public Schools
P.O. Box 2181, Milwaukee, WI 53201-2181
414-475-8751

Daniel Piotrowski	Reporting Specialist
Education	BS Computer Science, Professional Emphasis, University of Wisconsin-Oshkosh
Certification	Business Objects Certified Developer, Brio.Enterprise Certified Developer
Areas of Expertise	MS SQL Server DBA, Oracle PL/SQL, Programming Languages: Delphi, C, C++, JavaScript, Pascal, Visual Basic, Desktop development in MS Access and Crystal Reports. Business Intelligence Tools: Business Objects 5i and WebIntelligence 2.6, Silvon Data Tracker 2x and 3x, Brio.Enterprise 6x, and Seagate Info.
Background	Dan has over seven years experience designing and developing databases and core business and decision-support applications. In the last five years Dan has focused almost exclusively on business intelligence solutions.
	Dan is the lead developer on VersiFit's Business Objects team. He is a certified Business Objects developer and has participated in advanced seminars on extending and integrating Business Objects & WebIntelligence utilizing ASP, JSP and the Business Objects SDKs. Dan has built Business Objects Universes and advanced reporting solutions for both manufacturing and service clients.
	Dan has extensive experience with multi-dimensional data model development tools including Applix TM1, Microsoft Analysis Services and Cognos Series 7 PowerPlay and Transformation Server. Dan is a certified Brio applications developer. Dan has developed Brio data models and analytical applications for both manufacturing and service clients.
Relevant Experience	Columbus School District – Design and development of several Student Information data marts for inclusion in the federated data warehouse initiative. Development was done in Oracle 9i utilizing PL/SQL and other Oracle utilities.

St. Norbert College – Business Objects Universe development for Finance, Human Resources and Alumni production data sources. Development of sophisticated financial reports to be used by college administration and auditors.

Lawrence University – Brio.Enterprise implementation and development of a wide variety of analytical applications and reporting solutions for the finance and alumni from production data sources. Development required the creation of Oracle views and functions.

Oregon Department of Education – Report Developer/Analyst, Statewide Data Integration and Longitudinal Analysis System. Responsible for report detailed design, report development, unit testing, and implementation.
Mr. Joel Robe, KIDS III Regional Project Manager
Oregon Department of Education
255 Capitol Street NE, Salem, OR 79310
503-947-5709

Milwaukee Public Schools – ETL/Report Developer/Analyst, Data Warehouse, Dashboard, and Reporting Suite Implementation.
Deborah Lindsey, Director, Accountability & Assessment
Milwaukee Public Schools
P.O. Box 2181, Milwaukee, WI 53201-2181
414-475-8751

Eugene Public Schools – ETL/Report Developer/Analyst, Data Warehouse, Dashboard, and Reporting Suite Implementation.
Les Moore, Director, Computing and Information Services
Eugene Public Schools
200 North Monroe Street, Eugene, OR 97402
541-687-3329

Dalida Jongsma	Data Quality Lead/Analyst
Education	BS Computer Science, Dordt College, Iowa
Areas of Expertise	MS SQL, Oracle PL/SQL, Desktop Development in MS Access and Crystal Reports, Unit Testing, System Testing, User Experience Testing
Background	Dalida has more than 8 years experience in the Software Development Life Cycle. She started her career as a Lotus Notes software developer and later switched to Business Analysis. These two areas have given her the unique ability to communicate with the technical staff as well as the business users on a project. Dalida has assisted in modification of functional requirements for business process workflows, enabling the client to improve their business processes and Change management and Communications. She is a self-motivated and dedicated worker who is quick to acquire new skills.
	Dalida possesses several functional skills that bring added value to assist in the implementation of a detailed test plan which conforms to the functional requirements. She has proven abilities in managing project requirements and she is able to guide projects to a timely

completion. Her detail-oriented approach to acceptance testing ensures that projects meet requirements and industry standards. She is proficient in functional, negative, regression, system integration (SIT), acceptance (UAT), security, and browser compatibility testing.

Relevant Experience   Chicago Public Schools – Created test scripts for system and user acceptance testing of all the modules implemented at CPS. Worked with the development team to ensure that the data were displayed correctly and flowed from the source systems into the data warehouse and from there to the metrics on the dashboard. She also visited various schools to ensure that the metrics provided actionable data that would benefit the day to day operation of these schools.

John DiCello
Chicago Public Schools
125 S. Clark Street, Chicago, IL 60603
773-553-1669

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(7)   Management Meetings: The Contractor shall:

i.   Provide for a minimum of one monthly management meeting between the Contractor and State staff. These management meetings shall include review of the Work Plan and provide an opportunity to discuss task implementation and status.

ii.   Produce quarterly progress reports with relevant tasks and activities from the schedule and progress noted for each. Progress reports shall include a report of activities completed during the prior quarter. The reports shall provide a list of significant operational problems needing corrective action and shall address the following elements for each problem: a. identify the problem,

b.   assign responsibility for taking corrective   action,

c.   evaluate the importance of the problem,

d.   investigate possible causes of the problem,

e.   analyze the problem,

f.   recommend actions to prevent recurrence of this or similar problems,

g.   implement new process controls as necessary,

h.   determine what to do with the failed items, and

i.   record permanent changes in process documentation.

Each quarterly progress report shall also contain:

a.   a section that summarizes questions or complaints,

b.   a section that addresses issues or problems raised by the State,

c.   a section that addresses ongoing problems,

d.   a section that details the invoices submitted   and paid, and

e.   an executive summary that provides an informative and substantive description of the major problems and recommendations. Unanticipated issues or problems shall be reported and addressed as they occur. All progress reports should be submitted in a format and layout approved by the State in Microsoft Word or Microsoft Excel.via email.

iii.   Records and Minutes: The Contractor shall take minutes and record lists of participants, for all meetings. All minutes, records and lists of participants shall be provided by the Contractor to the State for review and approval after each meeting. All records and minutes should be provided in a State approved style and format in Microsoft Word via email or other electronic media. The Contractor shall review contact information for each meeting and update contact information if changed. iv. New Software Releases – New software versions will not be released to State end users until tested and approved by the State. The contractor shall provide the proposed software release to the State for acceptance/ regression testing. The contractor shall support such testing as required by the State. The contractor shall release the tested software version to State users only when authorized in writing by the State."

VersiFit will meet Tennessee Department of Education guidelines for management meetings using the proven Project Management Institute (PMI) PMIBOK Project Management Methodology and will conform to all of the requirements listed above concerning project meetings, reports, etc.

Per PMIBOK, VersiFit would comply with the above requirements through the communications management plan, which provides:

- Stakeholder communication requirements;
- Information to be communicated, including language, format, content, and level of detail;
- Reason for the distribution of that information;
- Time frame and frequency for the distribution of required information;
- Person responsible for communicating the information;
- Person responsible for authorizing release of confidential information;
- Person or groups who will receive the information;
- Methods or technologies used to convey the information, such as memos, e-mail, and/or press releases;
- Resources allocated for communication activities, including time and budget;
- Escalation process identifying time frames and the management chain (names) for escalation of issues that cannot be resolved at a lower staff level;
- Method for updating and refining the communications management plan as the project progresses and develops;

- Glossary of common terminology;
- Flow charts of the information flow in the project, workflows with possible sequence of authorization, list or reports, and meeting plans, etc.; and
- Communication constraints, usually derived from specific legislation or regulation, technology, and organizational policies, etc.

The communications management plan also includes guidelines and templates for project status meetings, project team meetings, e-meetings, and e-mail. The use of a project website and project management software can also be included if they are used in the project.

A Guide to the Project Management Body of Knowledge (PMBOK GUIDE) Fourth Edition, 2008, pp. 256-7.

A.6.   Project Modules. The Contractor shall provide the project manager, business analysts, database administrator and other resources to work with the State to design, configure, develop, and implement the data model.

VersiFit will provide the Tennessee Department of Education project manager, business analysts, database administrator and other resources to work with the State with extensive metadata about all software components including the reference architecture to design, configure, develop, and implement the data model. VersiFit will provide comprehensive support as needed to the Tennessee Department of Education to assist with the implementation and customization of the data model.

a. Tennessee K-12 Data Model and Reporting

   (1)   Design Phase

      i.   Gather detailed requirements and determine data sources for mapping to data model

      ii.   Define indicators and thresholds for analysis   and reporting

   (2)   Construction Phase

      i.   Create functional specifications to meet requirements defined in A.6.a.(1).

      ii.   Develop the program code based on the functional specifications

      iii.   Create test data and test scenarios.

      iv.   Deploy new code to test environment.

      v.   Provide unit testing and system testing of the developed program.

      vi.   Obtain user acceptance testing signoff.

   (3) Implementation Phase

      i.   Create or update installation and configuration documentation.

      ii.   Schedule and deploy the new code to the production environment.

iii. Assist with troubleshooting any response time or performance related issues resulting from newly released code.

iv. Provide technical support to the state.

VersiFit, with the approval of the Tennessee Department of Education, will integrate the Tennessee's K-12 Data Model and Reporting process, as outlined in A.6.a., with the Project Management Institute PMI PMBOK project management methodology and the VersiFit Project Execution Methodology to implement the P-12 LDS Early Warning Data System. The PMI and VersiFit approach has led to our *100% success rate over twelve years*.

With VersiFit's phased, proven methodology, the total implementation can be accomplished in under nine months and because of our incremental delivery approach, key solution ingredients can be running in as few as six weeks, which gives a rapid Return On Investment.

A.7. Training

a. The Contractor shall provide a User's Guide in electronic format for use during state provided training to districts.

VersiFit will provide a customized user's Guide for the Tennessee Department of Education with At Risk, Credit Recovery, College Readiness measurement use case examples, at risk processes with remediation processes, and related LEA training materials to promote constituent adoption and use, in an electronic format for use during state-provided training to districts. At least two training workshops will be filmed and made available for LEA on-demand training.

A.8. End User Technical Support

a. The Contractor shall provide a summary of the software support process for the proposed system, describing the telephone support, online support and if the support is available during normal business hours upon implementation of the system.

VersiFit will provide the Tennessee Department of Education with the following software support:

Support Plan Details

Coverage

All programs offer coverage from 8:00 am through 6:00 pm Monday through Friday Central Time excluding the standard U.S. holidays (10 days each year listed on the VersiFit and K12Intelligence.com web sites).

All programs will be renewed on July 1 of each year. Fees for maintenance purchased after July 1 will be pro-rated for the remainder of the period through June 30.

Number of User Support Contacts

- Maintenance Contacts: Three (3) experts from your organization may be designated to lead the Edvantage relationship with VersiFit Technologies. For an additional fee, you can assign more contacts.
- Support Contacts: Support contacts are limited to 3 pre-registered individuals per customer. The customer will assign a main contact. Authorized third party

contractors may be registered for contact.
- Primary Support Contact: This contact is the only one authorized to change who is a contact for the client or other client information in the system. This person can create a case.
- Primary Deployment Technical Contact: This contact receives all bug fixes, enhancement code, etc., and is our primary point of contact for our development team when we are developing, testing, and deploying new code. This role must be able to coordinate with the client DBAs and applications and infrastructure staff.
- Secondary Technical Support Contact/s. These are the technical team leaders at the client who will also be responsible for the Edvantage Solution site support and content development.
- A web-form will be sent to each participating customer to identify his or her contacts.

Case Logging

Telephone Case Logging: A central contact point offers you telephone access to report issues during standard business-day hours.

Online Case Logging: Access when you need it. There is a 24/7 online application to log new cases and, as available, track and update case information.

Means of Contact: VersiFit will provide three the standard approaches to communicate product issues to the product maintenance team.

Online – The primary means of communicating product issues to the Edvantage Solution maintenance team will be by logging in and creating a case at http://support.k12intelligence.com. In addition to being able to clearly communicate the issue (including posting documents and screen images), the creation of a case online will immediately send emails and cellular text messages to the on-call engineers. This approach provides immediate feedback in creation of the case & reference number as well as traceability for both the client and VersiFit. All maintenance cases can also be viewed and maintained from the VersiFit Extranet (VFX). If your Edvantage Solution environment is offline, please set the priority of the case to the "1" for *priority* routing.

Phone – Clients on maintenance can call the maintenance team directly at 800-610-1313 option 2. This line should be covered during standard business hours but is not necessarily the quickest means of communicating your issue (the online method will send immediately notify the on-call VersiFit staff). If your Edvantage Solution production environment is offline, please contact VersiFit on this line as well as creating a case online.

Email – Product issues can be emailed to the maintenance team at support@k12intelligence.com. These messages will be forwarded to the on-call technical support engineer and manager. If your Edvantage Solution production environment is offline please include "URGENT SYSTEM OFFLINE" in the email reference and also call the team at the phone number referenced above

Communications to the maintenance team should include the following:

- A complete description of the issue including an error numbers and/or messages

and/or examples such as SQL statements or production keys (Student ID, Course Sections, etc.)

- If the issue is intermittent or is regular and can be reproduced
- The environment (browser & operation system versions, hardware) if it is a client issue
- If you should be contacted at an alternate phone number or email than the one on record provide those
- A priority rating (following those listed below)

Self-Service Online Reporting: With access to a case/issue summary report, you are better able to identify recurring issues that may be resolved with consulting or education services.

You and the Edvantage Solution product support engineer will work together to assign the appropriate severity level to your case. The severity level assigned will reflect the nature and urgency of your case. A lower severity level does not mean that the development team devotes less time or energy to resolving your problem quickly and efficiently.

Note: When possible, the Product Support team will attempt to provide a workaround for your case until the problem can be resolved. Descriptions of case severity levels and response time guidelines can be found below.

Prioritization & Escalation:

Rating	Initial Response Goal	Update Frequency Goal	Case Classification
Priority 1	1 Hour	2 Hours	The Edvantage production environment is 80-100% unavailable from either a technical or business perspective.
Priority 2	2 Hours	1 Day	The Edvantage production environment is 20-80% unavailable from either a technical or business perspective.
Priority 3	4 Hours	3 Days	The Edvantage production environment has failed to perform a non-mission-critical task and is 1-20% unavailable. The problem is deemed one that can be worked with in the short term. The Edvantage Solution development environment is 0-100% unavailable.
Priority 4	8 Hours	5 Days	A minor problem, which does not make the production or development environment unworkable, is not related to a system failure.
Priority 5	1 Day	None	Content Development Support or "How-To" Inquiries

* Response goals are in business hours & days – if a Priority 1 issue was reported in the evening we would strive to respond within the first business hour of the next business day.

A.9.	Annual Updates to the Data Model
	a. The Contractor shall provide make available to the state any updates/additions made to their base K-12 data model. These updates shall include installation and configuration documentation on how to apply the updates and/or additions.

Tennessee Department of Education will be provided with annual releases (updates/additions) to our LEA K-12 data model including installation and configuration documentation on how to apply the updates and/or additions. At your

discretion, VersiFit will make the upgrades.

An upgrade release is software issued by VersiFit Technologies that contains an enhanced product version and new or improved functionality. A new version number identifies this package. For example, Edvantage 6.1 is an upgrade release from Edvantage 6.0. Upgrades are always announced publicly and customers must purchase upgrade releases unless they participate in one of our maintenance programs. The first Version of the Product was released in early 2001. It has been our practice to release new versions at least once per year.

A.10. The State may, at its sole discretion and with written notice to the Contractor, request changes in the scope of services that are necessary but were inadvertently unspecified in the scope of services of this Contract.

a. Memorandum of Understanding— After receipt of a written request for additional services from the State, the Contractor shall respond to the State, within a maximum of ten (10) business days, with a written proposal for completing the service. Said proposal must specify:

(1) the effect, if any, of implementing the requested change(s) on all other services required under this Contract;

(2) the specific effort involved in completing the change(s);

(3) the expected schedule for completing the change(s);

(4) the maximum number of person hours required for the change(s); and (5) the maximum cost for the change(s)— this maximum cost shall in no instance exceed the product of the person hours required multiplied by the appropriate payment rate proposed for such work.

The Contractor shall not perform any additional service until the State has approved the proposal. If approved, the State will sign the proposal, and it shall constitute a Memorandum of Understanding (MOU) between the Contract Parties pertaining to the specified change(s) and shall be incorporated, hereby, as a part of this Contract.

b. MOU Performance— Subsequent to State approval of an MOU, the Contractor shall complete the required services. The State will be the sole judge of the acceptable completion of work and, upon such determination, shall provide the Contractor written approval.

c. MOU Remuneration— The State will remunerate the Contractor only for acceptable work. All acceptable work performed pursuant to an approved MOU, without a formal amendment of this contract, shall be remunerated in accordance with and further limited by contract section C.3.c., PROVIDED THAT, the State shall be liable to the Contractor only for the cost of the actual person hours worked to complete the necessary work, not to exceed the maximum cost for the change detailed in the MOU. In no instance shall the State be liable to the Contractor for the cost of any person hours worked in excess of the maximum person hours indicated in or of any amount exceeding the maximum cost specified by the approved MOU authorizing the service. Upon State approval of the work, the Contractor shall invoice the State in accordance with the relevant provisions of this Contract.

VersiFit will conform to the above requirements concerning scope of services changes.

VersiFit has employed the following process successfully in many implementations, including the Chicago Public Schools initiative.

1. A change in project scope is identified. This is frequently a requirement that was not defined in the contract and/or the project statement of work.

2. The VersiFit DPD0120 Change Request form is prepared. Sections 1-4 of the Change Request form are completed by the VersiFit Project Leader: Section 1—Project & Request Name; Section 2—Rquest Date & Description; Section 3—Change Control Description; and Section 4—Action Plan and Impact Analysis.

3. The Change Request form is submitted to the Client Project Leader for Review. The Project Leader is responsible for review of the Change Request with the Project Management Organization members. The PMO approves or rejects the Change Request

   a. If the Change Request is rejected, Section 5—Action Plan Disposition, of the Change Request form is marked as Cancelled.

   b. If the Change Request is not rejected, it could be Approved, New Change Request, or Investigate.

      i. If Section 5 is marked as New Change Request, then a New Change Request Form is prepared to reflect a different scope.

      ii. If Section 6 is marked as Investigate, then more investigation of the current Change Request is performed to clarify the requirements and actions.

   c. If the Change Request is approved, Sections 6 – 9 are completed as appropriate: Section 6—Change Control Description; Section 7—Change Description, Build, Table, Column, and Documentation; Section 8—Change Description Attachment, and Section 9—Detailed Enhancement Specifications.

4. The Change Request is entered into the Project Plan and tracked as a separate task.

Following is an example of the Change Request form.

Section 1	Project & Request Name		
District	Chicago Public Schools		
Request Title			
Section 2	Request Date & Description		
Notice Date		Author	
Description of Change Request or Issues			
Justification/ Impact			

To be completed by Project Leader

Section 3 Change Control Identification		
Change/ Issue Control Number	Analyst Assigned	Analyst Assignment Date

To be completed by Assigned Business Analyst

Section 4	Action Plan & Impact Analysis		
Date	Additional Change/Issue Information		

Action Plan
Solution:

Impact Analysis[1]			
Additional Resource Requirements	Project Plan Adjustment	Estimated Cost	Other

Section 5 Action Plan Disposition							
Project Team Review Date	Approved	☐	New Change Request	☐	Investigate	☐	Cancel ☐
Customer Review Date	Approved	☐	New Change Request	☐	Investigate	☐	Cancel ☐

To be completed by Project Leader

Section 6
Change Control Disposition

Project Leader	Documentation Verification Date	Requester Documentation Package Sent	Closed Date	Closed Reason C = Completed Change Control NCR = New Change Request X = Canceled

Section 7					
Change Description					
#	Change Description	Build	Table	Column	Document

Section 8	
Change Description Attachments	
#	Title
1	
2	

Section 9 – Detailed Enhancement Specifications:

PROPOSAL STATEMENT OF CERTIFICATIONS AND ASSURANCES

An individual legally empowered to contractually bind the Proposer must sign and complete the *Proposal Statement of Certifications and Assurances* below as required, and this signed statement must be included with the proposal as required by the RFP Attachment 6.2.

The Proposer does, hereby, expressly affirm, declare, confirm, certify, and assure ALL of the following:

1. The Proposer will comply with all of the provisions and requirements of the RFP.

2. The Proposer will provide, for the total contract period, all services defined in the Scope of Services specified by the *Pro Forma Contract* attached to the RFP.

3. The Proposer accepts and agrees, without qualification, to all terms and conditions set out by the *Pro Forma Contract* attached to the RFP.

4. The Proposer acknowledges and agrees that a contract resulting from the RFP shall incorporate, by reference, all proposal responses as a part of the contract.

5. The Proposer will comply, as applicable, with:

    (a) the laws of the State of Tennessee;

    (b) Title VI of the federal Civil Rights Act of 1964;

    (c) Title IX of the federal Education Amendments Act of 1972;

    (d) the Equal Employment Opportunity Act and the regulations issued there under by the federal government; and,

    (e) the Americans with Disabilities Act of 1990 and the regulations issued there under by the federal government.

6. To the knowledge of the undersigned, the information detailed within the proposal submitted in response to the RFP is accurate.

7. The proposal submitted in response to the RFP was independently prepared, without collusion, under penalty of perjury.

8. No amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the RFP or any resulting contract.

By signature below, the signatory certifies legal authority to bind the proposing entity to the provisions of this RFP and any contract awarded pursuant to it. The State may, at its sole discretion and at any time, require evidence documenting the signatory's authority to legally bind the proposing entity.

PROPOSER SIGNATURE & DATE: May 31, 2011

PRINTED NAME & TITLE: Michael Restle, President

PROPOSER LEGAL ENTITY NAME: VersiFit Software, LLC

PROPOSER FEIN or SSN: 20-5840436

Appendix A: Letters of Recommendation

Following this page are five letters of recommendation from VersiFit clients.

MILWAUKEE PUBLIC SCHOOLS
DIVISION OF RESEARCH AND ASSESSMENT
5225 W.Vliet Street
Milwaukee, WI 53208
Phone: 414-475-8258/TTY: 888-808-0914
Fax: 414-475-8261

April 25, 2009

To Whom It May Concern:

Approximately six years ago, the Superintendent of Milwaukee Public Schools commissioned an audit of the district's student information system and data warehouse (DW). These audits, completed in June 2003 by IBM, contained a number of specific recommendations for improvement, including identifying a business sponsor for the DW to drive development to ensure a better match between users' needs and system capacity and functionality. As Director of Research and Assessment, I was identified as the functional owner of the DW.

Following a year-long strategic planning process that involved discussions with other districts as well as with internal staff, I let an RFP for an entirely re-designed DW.   Among the respondents to this RFP was VersiFit Technologies. Following a thorough review of the responses and vendor presentations, I awarded the contract to VersiFit based on the quality of their proposed solution, their flexible approach in working with MPS IT staff, and their relatively low cost. They began work in MPS in January of 2006, and within six months, established an entirely new table structure using historical data and ETL processes to capture updates on a daily basis.

Staff in Research and Assessment and in Technology selected Business Objects as the reporting tool for the new DW and began universe development with assistance from VersiFit. We launched our newly redesigned DW, along with VersiFit's dashboard and a full complement of reports, to end users in August, 2007. The DW provides school and district personnel with unprecedented access to student data with a few simple clicks of the mouse. Staff can access both school summary individual student detail information about enrollments, discipline, attendance, and test scores. A key attribute of the DW functionality is that users can drill to detail from summary statistics so they can make the data actionable by grouping individual students for specified interventions. Importantly, data is refreshed from the student information system nightly so that staff has the most up-to-date data available for planning purposes. And demographic filters can be employed to identify achievement gaps among student groups.

The MPS DW has been wildly successful – above and beyond my expectations. School staff frequently comment that they love the easy access to student data. But the real evidence of the success of the DW is in the numbers; usage statistics show that there has been a steady increase in the number of users this year. In September, there were 407 unique users accessing reports, but by mid-March, there were 738. Similar increases have been observed in the number of DW hits. For example, February of 2008 saw just under 3000 hits on reports in the DW, while the same month in 2009 saw just nearly 9500 hits!

As a vendor, VersiFit Technologies has been responsive to our business and information needs. I truly see them as a partner since they work so closely with us to continually improve the product for our district. Please feel free to contact me any time with any questions about our DW via phone (414-475-8751) or email (lindsedl@milwaukee.k12.wi.us).

Thanks,

Deb Lindsey, Director
Research and Assessment

Highline Public Schools
District 401
Educational Resource and Administrative Center
Department of Technology Services
15675 Ambaum Boulevard Southwest
Burien, Washington 98166
www.hsd401.org . 206-433-0111

April 2009

To Whom It May Concern:

Highline School District's mission is "Educate Every Student and Expect Excellence." Driven by that mission, Highline strives to maintain a focus on the ultimate goal of seeing every student graduate ready for college, career, and citizenship. To that end, a district-wide emphasis on literacy and mathematics drives decisions based upon metrics. Highline has concentrated significant resources on an aggressive literacy campaign. That literacy program included individualized assessments, the use of reading specialists working directly with children, and reading coaches who worked closely with teachers to analyze classroom instruction; thus meeting a diverse student population's needs.

Most recently, Highline expanded its campaign to include a calculated math initiative which aligned our efforts with the Bill and Melinda Gates Foundation, seven other Washington districts and VersiFit Technologies, LLC. This work is proving to increase student achievement while improving Highline's graduate placement rate in higher education.

The Highline School District serves nearly 18,000 students from preschool through grade 12 in 39 schools. There are 18 elementary schools, 1 early learning preschool, 4 middle schools, 11 high schools, and 5 alternative programs/middle/high schools. The district serves the communities of Burien, Des Moines, Normandy Park, SeaTac, Boulevard Park, White Center and unincorporated King County in the State of Washington.

As Director of Technology Services, I stress the value of improving the district's operations through rich technology offerings that assist staff in preparing Highline's students for a successful education experience. Under the direction of Superintendent John Welch; Deputy Superintendent Dr. Carla Jackson; Assistant Superintendent Geri Fain and Chief Accountability Officer Dr. Alan Spicciati, the Department of Technology Services was charged with an important role in helping schools meet that objective. The department provides technical assistance to administrators, support staff, teachers and students through access to usable and defined technologies.

As technical support for end users and visionaries for operational data, this department focuses on sensible data management with a high degree of customer service. Highline's decision to engage VersiFit met those goals and the integration of Edvantage into the district's accountability processes provides extensibility. Nonetheless, the district continues to work hard on various aspects of data analysis, but since Edvantage was introduced in December of 2007 the district's exposure into data and achievement has been more impactful. Now, the district is focused on two major phases of the Edvantage project:

Phase 1 – "Basic, Reliable, and Widely Accessed" – *A new training initiative to bring in additional users*
Phase 2 – "Connecting You to the Data You Need" – *An assistive measure to increase student achievement*

Highline is purposeful with its data systems, up to and including the replacement of student systems and a decision to upgrade the financial system. These changes benefit from the structures built around Edvantage and the exposure into data for transparent decision making. Highline has seen improved staff access and is seeing

an increase in student achievement; the results coming from a decision to use VersiFit to help Highline reach its goals.

To that end, as Highline reviews vendors, I seek organizations that have similar qualities to our culture and organization. I envision long term relationships--built on successes with flexible personnel, strong communication and opportunities to grow together. As Director, I engage in detailed communications surrounding contracts and projects and require that vendors operate consistently and within the scope of those defined contracts. VersiFit personnel have met each of these qualities and requirements. Their staff is polite, approachable, clear and concise in their work, operationally savvy and knowledgeable of the education market. These qualities make the work I do enjoyable the success of the project realized and creates new vision for future projects that will expand our data systems for more reliability and increased usability. I am pleased to offer this recommendation and offer my contact information to you for further correspondence.

Cordially,

Mark Finstrom
Director, Technology Services
Highline Public Schools
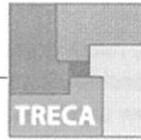ERAC % DoTS
15675 Ambaum Blvd SW
Burien, WA 98166

W: 206.433.2202
D: 206.248.6655
C: 206.947.6437
E: finstrmj@hsd401.org
W: http://hsd401.org

Phone: 740-389-4798   FAX: 740-389-4517

2222 Marion-Mt. Gilead Rd.   URL: www.treca.org
Marion, OH 43302

TRECA

4/16/2009

To whom it may concern,

TRECA is a consortium of 47 school districts throughout Ohio with an ADM of 82,000 students. Our largest district has 13,000 students and our smallest has 800.

In 2008, the decision was made to contract with Versifit Technologies to implement their K12 data warehouse. We are in our pilot phase with 4 districts and the process has gone very smoothly. We are in the process of performing data verification of the data marts within the data warehouse and utilizatin of the Versifit reports and the dashboard.

Our plan is to provide an orientation of the data warehouse with the remainder of our districts by the end of May 2009 and fully implement the program across our consortium though the beginning of FY10.

If you have any questions please don't hesitate to contact me at the information provided below

Charles Falter
TRECA Director of Data Services
cfalter@treca.org
(740) 389-4798 ext 258

SUSAN CASTILLO
State Superintendent of Public Instruction

OREGON DEPARTMENT OF EDUCATION
Public Service Building, 255 Capitol Street NE, Salem, Oregon 97310
Phone (503) 947-5600 • Fax (503) 378-5156 • www.ode.state.or.us

April 20th, 2009

RE: Letter of Reference

To Whom It May Concern:

- Over the last 3 years, the Oregon Department of Education Office of Assessment and Information Services and VersiFit have partnered on the K through 12 Integrated Data System (KIDS) project. During this time, VersiFit has assisted various school districts with their individual data warehouse implementations while working with the Oregon Department of Education's Student Transcript Exchange (OSTX) system. We have made the following observations on the strengths of VersiFit:

  In-depth understanding of data warehousing and educational data.
- Staff works with and leverages existing internal staff expertise.
- Maintains good communications with their clients throughout the process.
- Staff have excellent data warehousing and Microsoft SQL skills.
- Staff are extremely knowledgeable with building a solid data warehouse environment from the ground up.
- Have strong understanding of a variety of business intelligence tools
- Can assist client with selection process to acquire the right ETL, Metadata, or Business Intelligence tool.

We have appreciated the opportunity to work with VersiFit. We have found them to be very flexible and competent partners.

Sincerely,

Baron Rodriguez
Chief Information Officer
Oregon Department of Education

4J

School District 4J
Eugene Public Schools
200 North Monroe Street
Eugene, OR 97402-4295

April 17, 2009

To: Whom it May Concern

Re: Letter of Reference for VersiFit

The Eugene School District 4J selected VersiFit as our Data Warehouse vendor beginning in 2005-06. We were the first district in Oregon to select a vendor and begin a Data Warehouse. Since that early beginning most all the large districts in Oregon and the Oregon Department of Education have all selected the same vendor. Our specific Data Warehouse instance has grown to now include six other Oregon districts.

For Eugene School District 4J we now provide access for all administrators and teachers focusing primarily on student achievement. VersiFit has been a key partner in providing services, expertise, advice, knowledge transfer and support as we continue to expand the capabilities of the system. They have been responsive to our district, instance, and state needs as we have tried to develop a statewide Data Warehouse enterprise. VersiFit periodically gathers Oregon clients together to discuss upcoming changes and end user input.

We feel that we made a great choice in a Data Warehouse partner and would certainly make the same choice again.

Sincerely,

Les Moore
Director of Computing and Information Services
Eugene School District 4J
200 North Monroe St
Eugene, OR 97402
541.687.3549 office
541.334.4830 fax
moore@4j.lane.edu

Hillsboro School District 1J
TECHNOLOGY SERVICES

3083 N.E. 49TH PLACE, #122
HILLSBORO, OR 97124-6009
TEL: 503.844.1500
FAX: 503.844.1555
WEB: www.hsd.k12.or.us

April 27, 2009

Reference: Versifit Technologies

In 2003, the Hillsboro School District began working on a project to build a data driven culture in the organization. The project involved improving data quality, implementing systems ensuring the accessibility of data, and providing staff development. A key element of the project was the implementation of a Business Intelligence solution. The District launched an extensive process evaluating vendors and platforms to identify a partner aligned with the District's needs and vision. After nearly a year of work the District selected Versifit Technologies as its data warehouse partner.

Versifit Technologies was chosen for three primary reasons:

- Versifit Technologies demonstrates an understanding of K-12 operations and practices unique to the market place;
- Versifit Technologies provides a well designed, extensible, and powerful Business Intelligence solution. The system's flexibility provides customers the ability to tune the environment to meet their unique business needs;
- Versifit Technologies demonstrates the partnership model required by the District. Versifit allows customers to utilize the level of services appropriate for the customer. Versifit has shown the ability to effectively support customers with development groups as well as small districts requiring full support.

Since selection, Versifit continues to be a responsive solutions partner to the District. The Hillsboro School District directly serves approximately 20,400 K-12 students in Oregon's Washington County and collaborates with many regional and local agencies to enhance services. The District is currently working with these agencies to provide the Versifit Technologies' Business Intelligence solution throughout the region.

The Hillsboro School District continues to recommend Versifit Technology for Districts seeking a partner capable of delivering a scalable and robust Business Intelligence Solution.

Regards,

James R. Harrington
Chief Technology Officer
hton@hsd.k12.or.us

JH/jdh